

**US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(January 2001)**

Overview

The Program Management Services Achievement Report documents the Modernization Partner's ability to effectively provide Leadership and Direction Setting and to execute the processes and services as prescribed in the Modernization Program Plan.

The Leadership and Direction Setting function includes the following:

- Ensure across the enterprise the integration of the business functions, the application architecture required to support the business functions, the organization, and the Program direction
- Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan, revising as appropriate
- Revise Modernization Blueprint in accordance to the Target State Vision and Integrated Sequencing Plan
- Continue to develop relationships with strategic partners and product vendors to support Program initiatives and provide best in business solutions

In addition, the Modernization Partner leadership team is committed to helping SFA deliver to its milestones documented in the Modernization Blueprint Sequencing Plan, as documented below.

Outcomes Achieved:

The Modernization Partner leadership team has performed these functions as demonstrated below:

- ✓ Integration across the enterprise
 - Reorganized the Modernization Partner Team, aligning the teams with the PBO Victory List initiatives. The new structure ensures that the Modernization Program is focusing on the appropriate initiatives to achieve the goals of the program and that business solutions and technical architecture are integrated across the enterprise. The Management Council agrees to and supports the new organization.
 - The BI Delivery Team met with the NSLDS Mad Dog team to explain the Target State Vision application architecture and discuss long term concepts for enhancing/replacing NSLDS. In addition, they worked with the COD team and the EAI team to ensure that their respective efforts were well integrated.
 - Continued to generate and distribute the Bi-Weekly Scorecard to document progress made to date, identify issues and impact areas across the enterprise, and communicate

to all Modernization team members including the Management Council. The input to produce this report is developed by Modernization Partner and SFA business and technical representatives.

- ✓ Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan
 - Created a revised Target State Vision application architecture to reflect comments from Greg Woods. Successfully reviewed the revised diagram with SFA COO and CIO.
- ✓ Revise Modernization Blueprint
 - Continued to provide support to the Deputy CIO and delivered the final version of the Modernization Blueprint for Greg Woods review.
- ✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
 - Held full-day working session with PSG to discuss integration of Modernization and Transformation activities to better support the PBO.
 - Continued to work with PSG to plan and coordinate the development of the Operating Partner/SFA Scorecards.
 - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
 - Continued to develop relationships with CSC and EDS to participate in the transition of new systems into a production environment (SFA Intranet, IFAP/Schools Portal and FMS Applications Operations).
 - Continued to work with NCS and KPMG in conjunction with TIVWAN planning activities.
 - Continued working with CSC to establish a direct working relationship for establishing and managing development environments for Modernization projects.
 - Distinguished between VDC and Modernization Partner operations roles to clear up past confusion and further enhance our working relationship.
 - Coordinate monthly operating partner meetings with CSC, NCS, EDS, ACS, where the program status, opportunities, project directions are reviewed.
 - Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:
 - Initiated an effort to identify a potential suite of web-based solutions (through Application Service Providers) to support SFA's end-to-end human resources and human capital development needs.
 - Continue to communicate Modernization Program initiatives with individual vendors – Viador, Autonomy and Interwoven - which will utilize their technologies
- ✓ Overall Leadership and Direction Setting activities included:
 - Continued to chair the DSG and integrated the efforts of the Target State Vision, the Integrated Sequencing Plan, the Modernization Blueprint and program funding around agreed upon priorities.
 - Continued to support SFA Transition Team planning
 - Conducted the Modernization Partner “Traditions” course for all Modernization Partner team members, which included Candy Kane and Anne Teresa as guest speakers and Stephen Blair as a key presenter. This training session oriented team members to SFA’s history and service standards as well as introduced the impact SFA makes on individuals pursuing secondary education.

Key Milestones Delivered

Based on the Modernization Blueprint Sequencing Plan as of 8/31/00 (see Attachment A), the Modernization Partner has been effective in helping SFA achieve the milestones due for completion during the month of January 2001 as listed below. [The milestones noted with an asterisk (*) were rescheduled for completion during the month of January 2001.]

| Nbr | X-Ref | Project | Milestone |
|------------|--------------|------------------------------|------------------------------------------------------------|
| M5* | I.B | CRM Requirements Development | Final Business Recommendation (original due date 10/20/00) |

The milestones that were scheduled for completion during the months of September October, November, and December 2000, but were not completed are listed below with the revised completion date identified.

| Nbr | X-Ref | Project | Milestone | Revised Date |
|------------|--------------|----------------------------------|---------------------------------------------------------------------------------------|-------------------------------------|
| M21 | II.C.1c | e-Servicing | Requirements Defined (original due date 9/23/00) | February 28, 2001 |
| M22 | II.C.1c | e-Servicing | Complete Design (original due date 12/31/00) | February 28, 2001 |
| M31 | I.C | Web Portal | Application deployed to Production (original due date 9/30/00) | PRR scheduled for February 7, 2001 |
| M37 | V.B | Integrated Human Resource System | Initial draft of SFA Competency Model (original due date 12/31/00) | February 23, 2001 |
| M38 | | SFA University | SFA Front-to-Back Training deployed to all SFA employees (original due date 11/30/00) | June and July 2001 (pending TO Mod) |
| M54 | I.B | Web Portal | School Portal Release 1.0 (original due date 9/30/00) | PRR scheduled for February 7, 2001 |
| M56 | III.B | IFAP Replatforming | Replatforming Complete (original due date 9/30/00) | PRR scheduled for February 7, 2001 |

ATTACHMENT A:
Modernization Blueprint Sequencing Plan
(as of 8/31/00)